CMS Net

Generate Tickler List/Batch Correspondence

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This guideline is for training
and internal use only.

Generate Tickler List

**Generate
Tickler List**

This function will allow the user to create a list of all the ticklers in an area within a certain date range.

**Steps to Access
Generate Tickler
List/Batch
Correspondence**

Step	Action
1	Type **"EV"** for *Event Tracking* in upper case.
2	Press <Enter>.
3	Type **"G"** for *Generate Tickler List/Batch Correspondence* in upper case.
4	Press <Enter>.

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✔After pressing <Enter>, you will see the following prompt.

```
Select one of the following:


        1           REGIONAL OFFICE
        2           COUNTY
        0           LOCAL OFFICE


Select by: REGIONAL OFFICE//
```

Step	Action
1	Enter the appropriate option.
2	Press <Enter>.

After pressing <Enter>, you will see the following prompt.

```
Select REGIONAL OFFICE NAME:
        Or
Select COUNTY NAME
         Or
Select LOCAL OFFICE NAME:
```

Step	Action
1	Type in one of the following at the prompt: • If **County**, enter the first few letters of the name. • If **Regional** Office, type SRO, SFRO or SCRO. • If **Local Office**, type county name, then select local office within county.
2	Press <Enter>.

After pressing <Enter>, you will see the following prompt.

```
ENTER THE TICKLER LIST ID: ?

Choose from:
   ANN      ANNUAL REVIEW TICKLER (NEW ELIGIBILITY)
   APP      APPLICATION LETTER
   AUTH     AUTH EXPIRATION
   CRMR     CONFERENCE RETURN/MEDICAL REPORT DUE
   DXCR     DIAGNOSTIC CASE REVIEW TICKLER
   FEE      ENROLLMENT AND ASSESSMENT FEE TICKLER
   INTV     INTERVIEW SCHEDULED FROM PEND PROG ELIG
   MISC     MISCELLANEOUS
   MR       MEDICAL REPORT REQUEST FOLLOWUP
   MRRC     CASE REVIEW FROM MED REPORT RECD
   MTU      MTU CLOSURE
   OTCL     OT CLASSROOM PROGRAM
   OTEV     OT EVALUATION
   OTHP     OT HOME PROGRAM
   OTRX     OT RX
   OTTM     OT TEMPORARY MONITOR
   PEND     PENDING ELIG LTR
   PFIN     PENDING FINANCIAL DETERMINATION
   PMCAL    PENDING MEDI-CAL TICKLER
   PRES     PENDING RESIDENTIAL DETERMINATION
   PSA      PROGRAM SERVICES AGREEMENT
   PTCL     PT CLASSROOM PROGRAM
   PTEV     PT EVALUATION
   PTHP     PT HOME PROGRAM
   PTRX     PT RX
   PTTM     PT TEMPORARY MONITOR
   RMR      REQUEST MEDICAL REPORT
   ROI      RELEASE OF INFORMATION
   SCH      SCHEDULE CLINICS
   TP       TRANSFER PENDING


ENTER THE TICKLER LIST ID:
```

Step	Action
1	Type **"?"** to display options
2	Enter the appropriate selection.
3	Press <Enter>.

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If Tickler ID selected generates no correspondence	The following prompt will appears for the AUTH, DX, FIN, TP, and RMR ticklers. No correspondence will be generated during these processes.

```
FROM:  (2/1/1999 – 5/10/2000): 02/01/1999//   (02/01/1999) •
```

➡ Prompt displays date range for which there are ticklers.

Step	Action
1	Enter date you want your tickler to start with, **OR** Press <Enter> to select date range in prompt.

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Generate Tickler List, Continued

After pressing <Enter>, you will see the following prompt.

```
TO:  (2/1/1999 – 5/10/2000): 05/10/2000//   (05/10/2000) •
```

➡ Prompt displays date range for which there are ticklers.

Step	Action
1	Enter date you want your tickler to end with, **OR** Press <Enter> to select date range in prompt.

For the RMR and the TP ticklers, the following prompt will appear.

```
Start with name: FIRST//
```

➡ Type in the first letter of the alphabet for which you would like to run the tickler report.

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After pressing <Enter>, you will see the following prompt.

```
DEVICE: •
```

Step	Action
1	Type **SPOOL** to print to local printer, **OR** Press <Enter> to display Tickler on screen.

If MISC was chosen

If MISC was chosen, the following prompt will also appear:

```
Do you wish to see the list for all users? NO// •
```

Generate Tickler List, Continued

Step	Action
1	Enter NO to print only your list, **OR** Enter YES to print list from all staff.
2	Press <Enter>.

If NO was entered, the following prompt appears:

```
Select STAFF NAME: •
```

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Generate Tickler List, Continued

Step	Action
1	Enter the *Staff Name* LASTNAME,FIRSTNAME format.
2	Press <Enter>.

After pressing <Enter>, you will see the following prompt.

```
FROM:  (2/1/1999 – 5/10/2000): 02/01/1999//   (02/01/1901) •
```

➡ Prompt displays date range for which there are ticklers.

Step	Action
1	Enter date you want your tickler to start with, **OR** Press <Enter> to select date range in prompt.

Generate Tickler List, Continued

After pressing <Enter>, you will see the following prompt.

```
TO:  (2/1/1999 – 5/10/2000): 05/10/2000//   (05/10/2000) •
```

➡ Prompt displays date range for which there are ticklers.

Step	Action
1	Enter date you want your tickler to end with, **OR** Press <Enter> to select date range in prompt.

Generate Tickler List, Continued

After pressing <Enter>, you will see the following prompt.

```
DEVICE: •
```

Step	Action
1	Type **SPOOL** to print to local printer,
	OR
	Press <Enter> to display event on screen.

If ID selected generates Batch Correspondence

The following ticklers will generate batch correspondence: MR, LTR, and APP. Batch correspondence is a system process that automatically updates the letter cycle, ticklers, and generates an automatic narrative for clients that appear on your tickler list.

Important Note

Please be very careful when you use this option because mistakes are difficult and time consuming to correct.

```
Do you wish to generate batch correspondence? Yes// •
```

Step	Action
1	Press <Enter>, **OR**
	Type **"N"** to skip.
2	Press <Enter>.

Pressing <Enter> for Yes to Batch Correspondence causes the following system functions to happen:

- Generates the correspondence for the patients having expired ticklers falling within the date range.
- Creates another tickler.
- Updates the status in the appropriate function.
- Allows you to print the letters.

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Generate Tickler List, Continued

Select Dates

After pressing <Enter>, you will see the following prompt.

```
FROM:  (2/1/1999 – 5/10/1999): 02/01/1999//   (02/01/1999) •
```

➡ Prompt displays date range for which there are ticklers.

Step	Action
1	Enter date you want your tickler to start with, **OR** Press <Enter> to select date range in prompt.

Generate Tickler List, Continued

After pressing <Enter>, you will see the following prompt.

```
TO:  (2/1/1999 – 5/10/1999): 05/10/1999//   (05/10/1999) •
```

➡ Prompt displays date range for which there are ticklers.

Step	Action
1	Enter date you want your tickler to end with, **OR** Press <Enter> to select date range in prompt.

Select Case Type   After pressing <Enter>, you will see the following prompt.

```
Select one of the following:

     0               TEMPORARY NUMBERS
     1               CCS CASE NUMBERS
     B               BOTH

Enter response:
```

Step	Action
1	Enter the correct option, which fits your needs.
2	Press <Enter>.

To Print   After pressing <Enter>, you will see the following prompt.

```
DEVICE: •
```

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Step	Action
1	Type **SPOOL** to print to local printer, **OR** Press <Enter> to display event on screen.

Select Letter   After pressing <Enter>, you will see the following prompt.

```
Select LETTER to send: ?
 Answer with LETTER CONTROL TYPE OF MAIL
Do you want the entire LETTER CONTROL List? y  (Yes)
Choose from:
 C-13       MEDICAL REPORT REQUEST 5/95 •
 C-13A      MED RPT REQ FROM DEP CO 5/95 •
 C-14       MEDICAL REPORT FINAL REQUEST •
 C-17       MED RPT REQ-ROI COVER LETTER-DEP CO. •
 CCS-17A    PROVIDER RELEASE OF INFORMATION FORM •
 MTU-1      MTU MED RPT REQ LTR #1 •
 MTU-2      MTU MED RPT REQ #2 •

Select LETTER to send:
```

Generate Tickler List, Continued

Step	Action
1	Select the appropriate letter.
2	Press <Enter>.

- If you are processing a Medical Report Request Follow-up and the current letter is the C-14 (2nd letter), you can press <Enter> without entering a letter to force a final action (No Letter Sent).
- If you are processing for an Application Letter Follow-up, the cycle status is as follows: C-36, C-36A, C-36B or C-36M, C-36MA, C-36MB or C-36HF, C-36HFA, C-36HFB. After all three letters have been sent, the application status must be updated to No Action – No Response for each clients' record.
-
- If you are processing for a Financial Letter Follow-up, the cycle status is as follows:

Initial Financial Letters	Annual Financial Letters
C-16, C-16A, C-16B	C-38, C-38A, C-38B
C-16M, C-16MA, C-16MB	C-38M, C-38MA, C-38MB
C-16HF, C-16HFA, C-16HFB	C-38HF, C-38HFA, C-38HFB

If No Letter Sent

➡ If you press <Enter> on a Medical Report Request Follow-up, you will see the following message and prompt.

```
NO LETTER SELECTED,  CAN'T SEND MAIL.

Do you want to process non-letter final actions? <NO>
```

Step	Action
1	Type "Y" to create non-letter final action, **OR** Press <Enter> to cancel.

Generate Narrative

After pressing <Enter>, the following prompt appears:

```
Do you want to generate automatic NARRATIVES? No//
```

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Generate Tickler List, Continued

Step	Action
1	Type "Y" to generate an automatic narrative for each patient who has correspondence generated,
	OR
	Press <Enter> to skip.

➡ If you are creating narratives for a medical report request follow-up, the following prompt appears:

```
Select NARRATIVE TEXT NAME:?

 Answer with NARRATIVE TEXT NAME
Do you want the entire NARRATIVE TEXT List? Y  (Yes)
Choose from:
   CHILD NOT SEEN
   NO REPT RECD
   RECEIVED MED REP

Select NARRATIVE TEXT NAME:
```

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Step	Action
1	Type the appropriate option from the list.
2	Press <Enter>.

After pressing <Enter>, the following prompt appears:

```
DEVICE for BATCH CORRESPONDENCE LIST: HOME//
```

Step	Action
1	Type **SPOOL** to print list, **OR** Press <Enter> to display.

If you entered "**SPOOL**" to print list of patients who have had correspondence generated and those who need correspondence, but don't completely meet the selection criteria. The letters are only generated for those patients that meet all the criteria.

Important Note

You may have to run a batch correspondence tickler list multiple times to accommodate generating each series of letter type.

You have successfully generated a Tickler List and printed Batch Correspondence.

Tickler List

**Generate
Tickler List**

The following ticklers are generated from the Therapy Unit module.
No correspondence will be generating during these processes.

- SCH
- ROI
- OTCL
- OTEV
- OTHP
- OTRX
- OTTM

- PTCL
- PTEV
- PTHP
- PTRX
- PTTM
- CRMR
- MTU

```
Select MTU SITE:
```

Step	Action
1	Type a "?" to display a list, or type in the name of the MTU facility.

```
Select THERAPIST:
```

Step	Action
2	Type a "?" to display a list, or type in the name of the therapist.

After pressing <Enter>, you will see the following prompt.

```
FROM:  (2/1/1999 - 5/10/2000): 05/10/2000//   (05/10/2000)
```

➡ Prompt displays date range for which there are ticklers.

Step	Action
3	Enter date you want your tickler to start with, **OR** Press <Enter> to select date range in prompt.

After pressing <Enter>, you will see the following prompt.

```
TO:  (2/1/1999 - 5/10/2000): 05/10/2000//   (05/10/2000)
```

➡ Prompt displays date range for which there are ticklers.

Step	Action
1	Enter date you want your tickler to end with, **OR** Press \<Enter\> to select date range in prompt.

After pressing \<Enter\>, you will see the following prompt.

```
DEVICE:
```

Step	Action
1	Type **SPOOL** to print to local printer, **OR** Press \<Enter\> to display Tickler on screen.

NOTES

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Miscellaneous Tickler Edit/Entry

Miscellaneous Tickler Edit/Entry

This feature is for personal use – a reminder to do something for a specific patient.

```
Select PRIMARY Option: E (Event Tracking)


EVENT TRACKING OPTION: MI (Miscellaneous Tickler Edit/Entry)
```

Step	Action
1	Type **"EV"** for *Event Tracking* in upper case.
2	Press <Enter>.
3	Type **"MI"** for *Miscellaneous Tickler Edit/Entry* in upper case.
4	Press <Enter>.

Miscellaneous Tickler Edit/Entry, Continued

Identify Patient

After pressing <Enter>, the Patient Identification screen appears:

```
CMS                  PATIENT IDENTIFICATION FOR:           CMSPI-10
                     MISCELLANEOUS TICKLER ENTRY/EDIT


        Enter one of the following identifiers:


        CCS Number:


        Pt Name:


        Birthdate:                   Gender:


        Client Index Number:


```

For instructions on identifying your patient, see the Patient ID section of this manual.

➡ The patient must have an "Active" case status to generate a tickler list.

Miscellaneous Tickler Edit/Entry, Continued

Select Date   After pressing <Enter>, the following prompt appears:

```
Select MISCELLANEOUS TICKLER DATE:
```

Step	Action
1	This is today's date.
2	Press <Enter>.

Miscellaneous Tickler Edit/Entry, Continued

After pressing <Enter>, the following prompt appears:

```
Select MISCELLANEOUS TICKLER DATE:T   08/17/1999

Are you adding'08/17/1999' as
   a new MISCELLANEOUS TICKLER DATE (the 1ST for this PATIENT)?
```

Step	Action
1	Type "**Y**" for yes.
2	Press <Enter>.

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Miscellaneous Tickler Edit/Entry, Continued

After pressing <Enter>, the following prompt appears:

```
MISCELLANEOUS TICKLER DATE: 08/17/1999//
```

Step	Action
1	Press <Enter> to accept date, **OR** An "@" sign to delete tickler.

Identify Reason

After pressing <Enter>, the following prompt appears:

```
REASON:
```

Step	Action
1	Type reason in free text.
2	Press <Enter>.

Set Due Date   After pressing <Enter>, the following prompt appears:

```
    DUE DATE:
```

Step	Action
1	Enter date in MM/DD/YY format, **OR** T + ## (ex: T+30 days)
2	Press <Enter>.

After pressing <Enter>, you are brought back to the Patient Identification Screen, CMSPI-10 and have successfully set up miscellaneous tickler.

➥ To "Delete" an entry, type a "D" in the "DUE DATE" field.

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NOTES

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